

20 REASONS FINANCIAL ADVISERS PARTNER WITH QUILTER CHEVIOT



QUILTER CHEVIOT

After 20 years of dedication to the financial adviser market: 20 reasons financial advisers choose to partner with Quilter Cheviot.

1. **We have no in-house financial advisers** – so there are no conflicts between our interests and yours.
2. **Genuine deference to the adviser client relationship** – our business approach is structured entirely to enable us to provide a service complementing that provided by a financial adviser. We never lose sight of the principle that the adviser owns the client relationship and expect the adviser to be an advocate of his/her client's views and to challenge us on the client's behalf if required.
3. **We take an unbiased investment approach** - We are one of the largest investment management firms in Ireland and the UK.
4. **Institutional buying power reducing transaction costs** - With over €24.4bn* funds under management, we have institutional buying power, reducing costs deducted from your clients' portfolios.
5. **Truly Bespoke portfolios** - Our investment managers create genuinely bespoke portfolios that meet not only clients' investment objectives and personal risk requirements, but also cater for cherished holdings, capital gains tax management and income from capital as well as yield.
6. **Solutions for all client segments** - Clients with portfolios of all sizes from €25,000 or more can access our investment strategies through a two tiered proposition comprising of our Discretionary Portfolio Service (DPS), and Managed Portfolio Service (MPS).
7. **Dedicated adviser support team** - You will have access to a dedicated intermediary support team to help with any questions you may have.
8. **We facilitate adviser charging** – ensuring you are appropriately remunerated for your services.
9. **We are one of Ireland and the UK's largest independently owned discretionary investment management firms** - with a heritage that can be traced back to 1771, we work with over 40,000 private clients, trustees, charities, pension funds and their professional advisers.
10. **We have dedicated in-house research capability** - allowing us to seek out and validate the best investment opportunities for our clients from across the globe. You can be confident that all monitored investments held in your clients' portfolios are fully researched and have been subjected to extensive due diligence.
11. **Independent performance monitoring** - We regard benchmarking as an integral part of portfolio management and subscribe to independent industry performance surveys, most notably Asset Risk Consultants, Defaqto, Enhance and the WM Charity Index.
12. **Award winning investment management** – we have won numerous awards for our investment performance over the past two years including PAM Performance Award 2014 for Growth Portfolios and Citywire Best Overall Performance for a Medium Sized Firm 2013.
13. **Award winning client service** - With a strong client centric approach to service which is ingrained in every part of our business we have won accolades for the quality of our overall service. In 2012 we won the Gold Standard Awards for Service and in 2012, 2013, 2014 and 2015 we have been awarded the Defaqto 5 Star Award. Most recently we won an FT Adviser 5 Star Online Service Award 2014.
14. **We do not divide the roles of relationship and investment manager** - we believe you and your clients should have ongoing, regular dialogue directly with the person who is making the investment decisions.
15. **Experienced investment managers** - Our investment managers have an average of 19 years' investment experience and you can be confident that we are experienced investment managers and understand how we can best work with financial advisers.
16. **Investment management at a local level** - With a head office in London and a network of local offices throughout Ireland, the UK and Jersey, we are ideally placed to provide a personal approach.
17. **Regular reporting and online portfolio access** – We provide clear, regular and comprehensive reports to keep you and your clients fully informed about the progress and structure of their portfolio. Clients and their advisers can also access their portfolios online at any time for valuations and transaction details.
18. **Independent risk mapping** - As part of your suitability requirements, assessing your client's appetite for risk and then aligning your assessment to managed portfolio strategies (MPS) can be painful.



19. **Our operations team is dedicated to providing a first class administration service** - this means that you can rely on us to administer your clients' portfolios efficiently without extra demands on your time or that of your support staff.
20. **At the forefront of innovation** – constantly seeking out new investment opportunities from across the globe, as well as having led the way in developing professional investment outsourcing solutions for financial advisers

For more information or to talk to one of our discretionary investment managers, call us now on 01 799 6900 or visit www.quiltercheviot.ie.

June 2015

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* as at 30 June 2015

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